SOPHTLOGIC

Automatic/Alert Queries

User Manual

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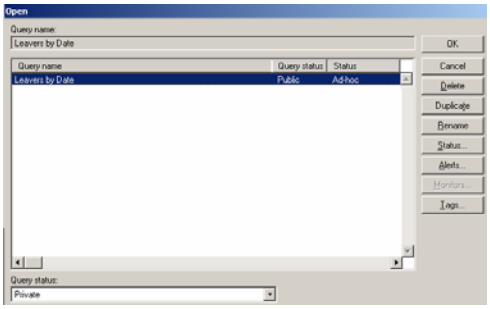
Automatic / Alert Queries

Scheduling queries allows a user to set up queries to be run at regular intervals. When a person logs in to pharOS they will be prompted with any outstanding 'Automatic Queries'. Once an 'Automatic Query' has been run the results are then stored in the database and can be compared to other results of the same query run previously.

The Alert Button allows you to setup an Email Alert, so the User(s) is/are notified after a Query is Run.

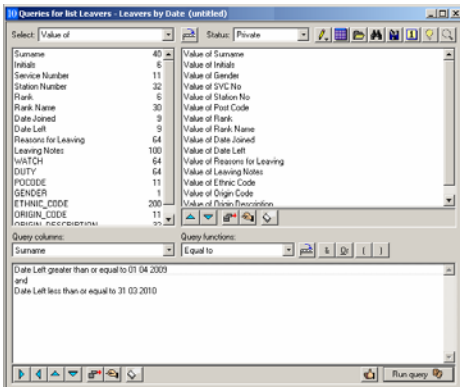
To Set Up an Automatic Query

Find the Query you want to use, within Query Buster…



- Open a Query
- Click onto the Folder icon
- Click onto the Saved Query
- Click OK

In order to do this there must be a 'Saved Query'.

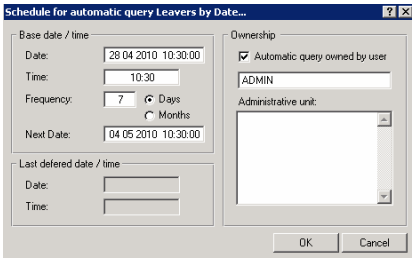


- Open the saved query

To set the (untitled) query to the 'Automatic Queries'.

- Click on the 'Grid' button

This will open the 'Schedule for Automatic Query Applications' window



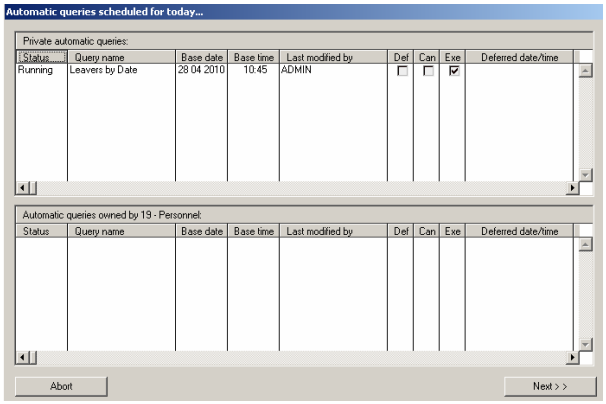
- Enter in a 'Base Date' i.e. date from which query is to start from
- Enter in desired 'Time' for the query to be run e.g. 10:30
- Enter in 'Frequency' of query whether it is in days or months
- Click 'OK' to 'Save Automatic Scheduling of Query'

For example: If you wish the query to run starting from the beginning of the year, with a frequency of every 7 days at 09.30, the 'Base Date' would be set at 01 04 2010, the frequency 7 with corresponding 'Days' radio button selected to 'Days' and time specified as 09.30, that query will automatically appear every seven days.

To refresh the system for the Query to set, log out then log back in: File > Log Out > File > Login.

- Choose the 'Office/Department' the Query was saved under

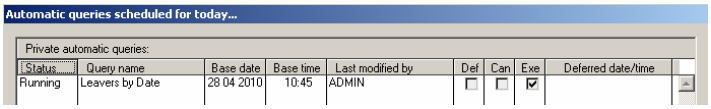
The 'Automatic Queries Scheduled for Today' window will appear



As you can see the 'Scheduled Query' is in the reminder window

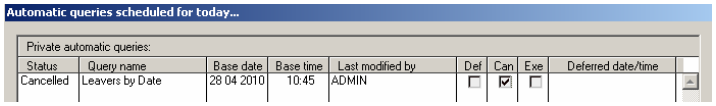
Exe > Running

Default - This option will 'Run' the Query



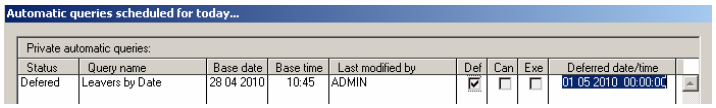
Can > Cancelled

This option will 'Cancel' the Query



Def > Deferred

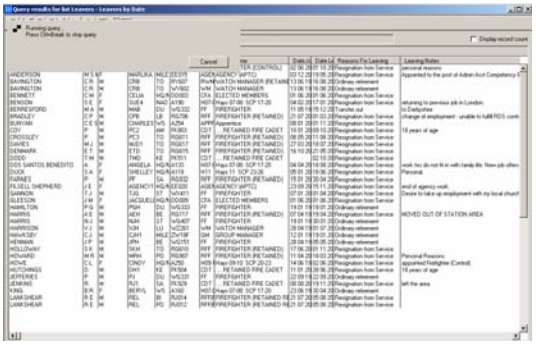
This option will 'Defer' the Query to a different date



To run the Query

- Click onto the Next button

A dialog box will appear saying Executing Query



Very quickly the Query will flash onto the screen then disappear

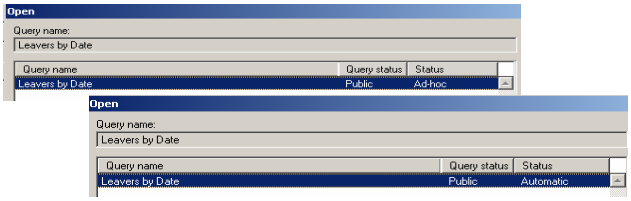
To Retrieving Results of Automatic Queries go to page 11

If you don't want the Query to Run

- Click onto the 'Abort' button

The 'Automatic Queries Scheduled for Today' window will close

Notice the heading has changed on your saved (automatic) query from <untitled> to <automatic> This allows the user to know if the query has been setup as a to be automatically run

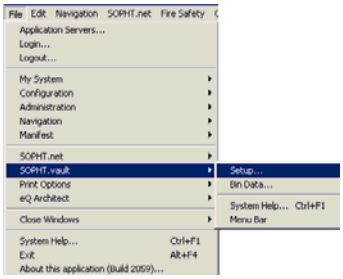


Also in the 'saved Query' window the 'Status' has changed from 'Ad-hoc' to 'Automatic'

Setup Email Address

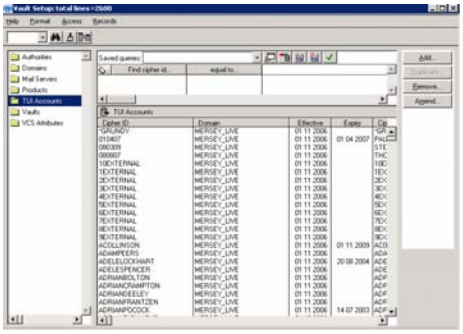
If there are no email addresses within the 'Set Alerts for Queries' window you; if you have the privileges, will need to set the emails up first before allocating the query to be sent to that persons email address. To do this…

In the Toolbar



- Go to File
- Scroll down and Click onto SOPHT.vault
- Click onto Setup

The Vault Setup window will appear



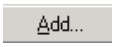
- Click onto the TUI Accounts window
- Click onto the Green Tick icon

As you can see the personnel who have a TUI Account will appear

- Click onto the Persons Name
- Click onto the Amend button

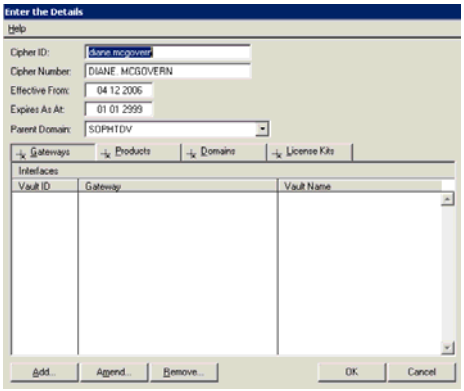
If the persons name is not in the list

- Click onto the Add button

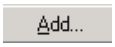


The Gateway Interface window will appear with the person's details

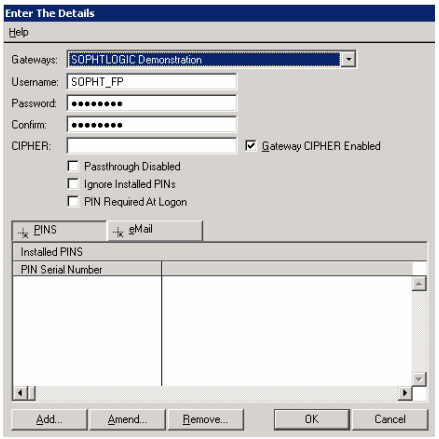
In the Interface window, under Gateway Tab



- Enter the Cipher ID > this will be the Users Name
- Enter the Cipher Number > this will be the Users Name
- Enter the Effective From date > users start date
- Enter the Expires As At date > this will be the date the licence expires
- Click onto the Parent Domain arrow
- Select the Domain option
- Click onto the Add button

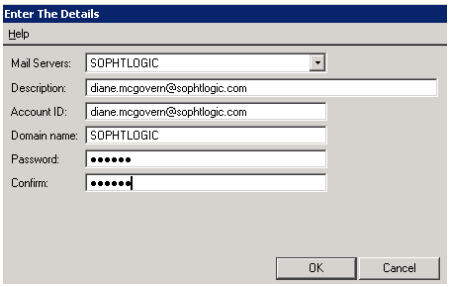


This will open the Gateways Details window



- Click onto the 'Gateways' arrow
- Click onto the 'Gateway' option
- Enter the 'Username' > users name
- Enter the 'Password' > users name
- Confirm the 'Password' > users name
- Click into the 'Gateway CIPHER Enabled' check box

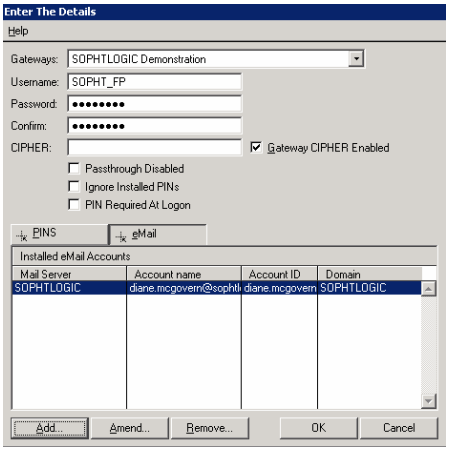
- Click onto the 'Email' tab
- Click onto the 'Add' button



- Click onto the 'Mail Servers' arrow
- Select the option in the list (should only be one)
- Click into the Description box
- Enter the Email Address
- Click into the Account ID box
- Re-enter the Email Address
- Enter the Domain Name

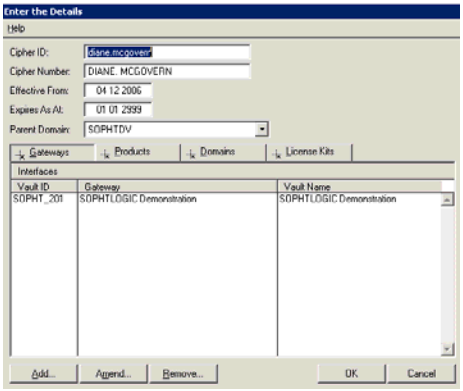
Usually the Brigade i.e. Merseyside, Bedfordshire, Essex, Lothian etc

- Enter a password - best to use the Post code
- Confirm the Password
- Click onto the OK button



As you can see the email information has been entered into the Installed Email Account

- Click onto the OK button

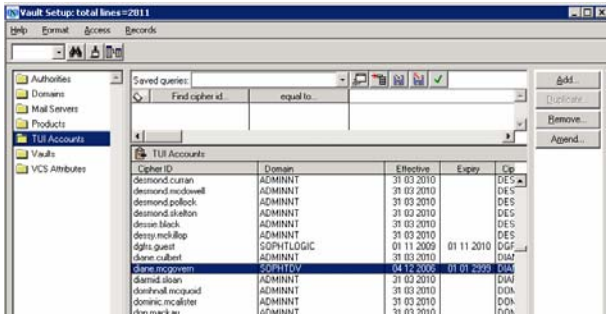


This will bring you back the Gateway Interface window

Again

- Click onto the OK button

You should be back into the Vault Setup window

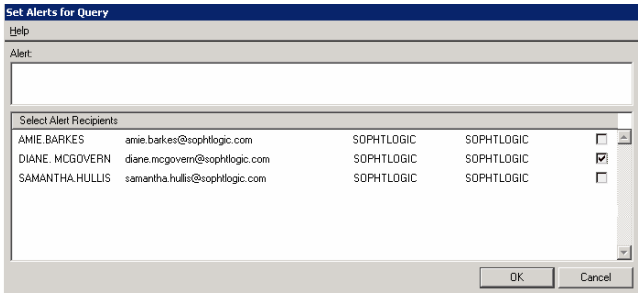


As you can see the TUI account has been set up

- Click onto the 'X' in the top right hand corner to close the window

To check the email is in the 'Alerts Email' list

- Go to Query Manager
- Click onto Query Buster
- Click onto a Library
- Click onto a Query
- Click onto the Queries button
- Click onto the Open Folder icon
- Click onto the Saved Query
- Click onto the Alerts button
- Click onto the Add button



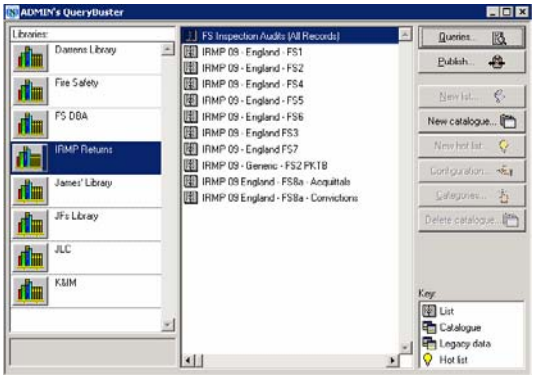
As you can see the Email that has been set up has appeared in the 'Alerts' list

- Click onto the 'OK' button

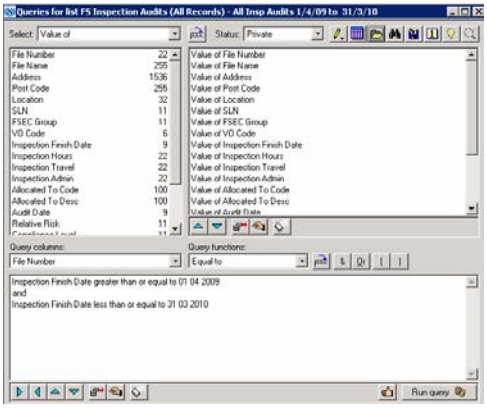
Setting Up an Alert Query

Now you need to find the Query you want to use, within Query Buster…

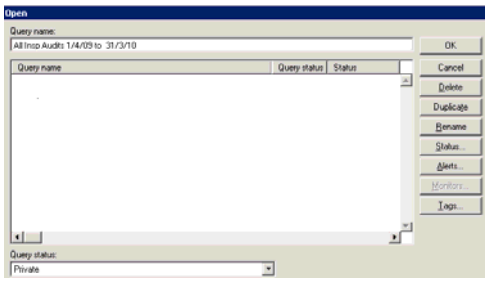
- Go to Query Manager
- Click onto Query Buster



- Click onto the 'Library'
- Select the 'Query'
- Click onto the 'Queries' button



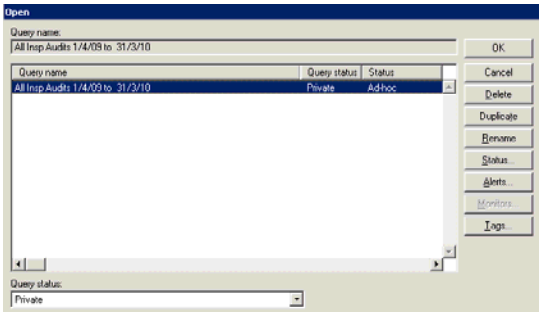
- Create your 'Query'
- Click onto the 'Saved' icon



- Enter a 'Name' of the query
- Click onto the 'OK' button
- The saved query will appear in the box below

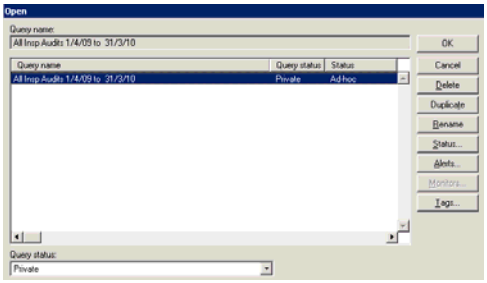
If the 'Query' has already been 'Saved'

- Click onto the 'Folder icon
- Click onto the 'Saved Query'
- Click 'OK'



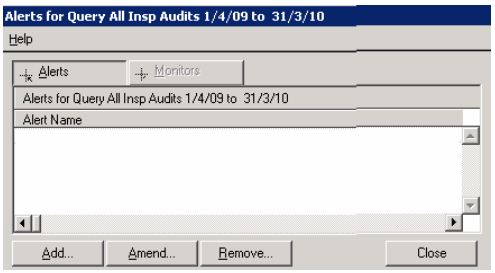
Alerts button

The Alert Button allows you to set up an ‘Email Alert’, so a ‘User(s)’ is/are notified after a ‘Query is Run’.



- Click onto the ‘Saved Query’
- Click onto the ‘Alerts’ button

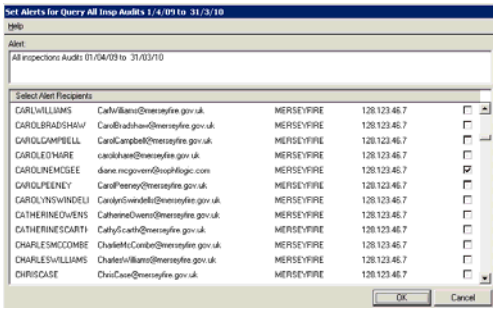
The Alerts window will appear



- Click onto the ‘Add’ button

The ‘Set Alerts’ window will appear

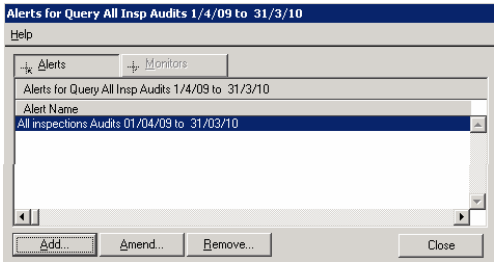
In the ‘Alert’ box



- Enter a ‘Description of the Alert’

This will be the heading for your ‘Query Alert’

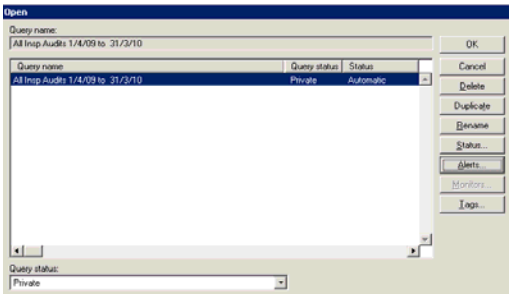
- Select the ‘Emails you want the ‘Alert’ to go to
- Click onto the ‘OK’ button



As you can see the ‘Alert Name’ will appear in the Alerts’ window

- Click onto the ‘Close’ button

You should now be in the ‘Query Name’ window



Notice in the ‘Status’ has changed from ‘Adhoc’ to ‘Automatic’

- Click onto the ‘OK’ button

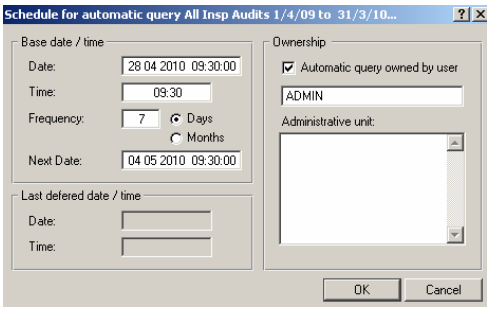
You should now be back in the ‘Query Buster’ window

Now you need to set up when and what time you want the 'Query' to be sent

To do this

- Click onto the 'Blue Grid' icon

The 'Schedule for the Automatic Query' window will appear



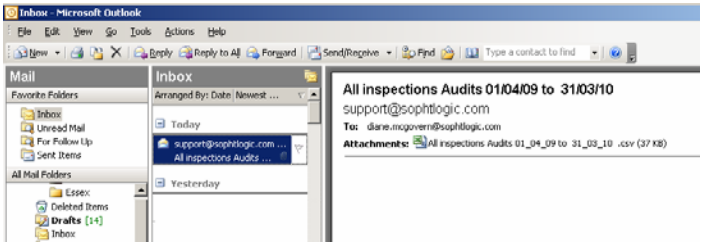
- Enter the 'Date' you want the 'Alert Query' to start
- Enter the 'Time' you want the 'Alert Query' to be sent
- Enter the 'Frequency' of the 'Alert Query' i.e. daily (1 day), weekly (7 days), monthly (1 month) etc…
- Enter the 'Next Date' the 'Alert Query' is due
- Click onto the 'OK' button

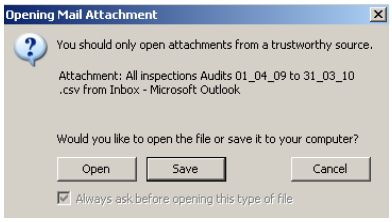
For example: If you wish the query to run starting from the beginning of the month/year, with a frequency of every 7 days at 09.30, the 'Base Date' would be set at 28 04 2010 or 04 05 2010, the frequency 7 with corresponding 'Days' radio button selected to 'Days' and time specified as 09.30.

Notice the heading has changed on your saved (automatic) query from <untitled> to <automatic> This allows the user to know if the query has been setup as a to be automatically run

Queries for list FS Inspection Audits (All Records) - All Insp Audits 1/4/09 to 31/3/10 (untitled)
Queries for list FS Inspection Audits (All Records) - All Insp Audits 1/4/09 to 31/3/10 <automatic>

Results of the 'Alert Query' will be 'Emailed' to the 'Person(s)' in an attachment as shown below.



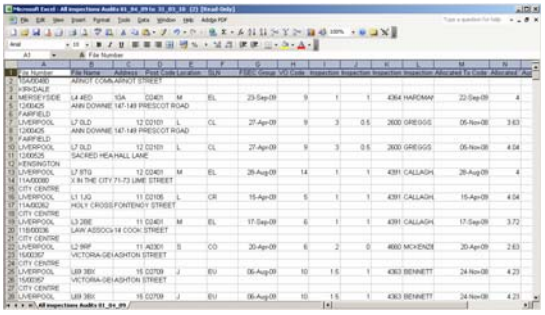

Opening Mail Attachment
You should only open attachments from a trustworthy source.
Attachment: All inspections Audits 01_04_09 to 31_03_10 .csv from Inbox - Microsoft Outlook
Would you like to open the file or save it to your computer?
Open
Save
Cancel
Always ask before opening this type of file

- Click onto the 'Attachment'

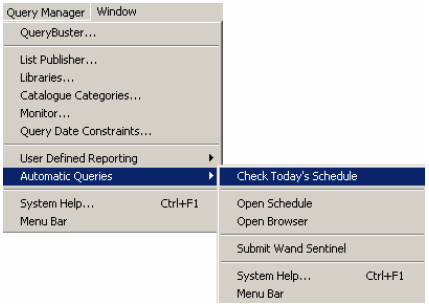
The 'Open Mail Attachment' window will appear

- Click onto the 'Open' button

The Excel window will open showing the results of the Query.



Retrieving Automatic Queries

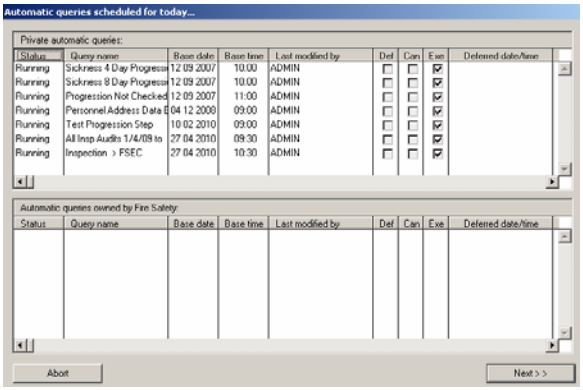


To check the Queries that was Automatically Scheduled for Today

- Click onto 'Query Manager'
- Scroll down to 'Automatic Queries'
- Check 'Today's Schedule'

If no queries are due to be run for that day, no window will display.

If queries do exist:



As you can see the query we have just created is now in the 'Scheduled for Today' list

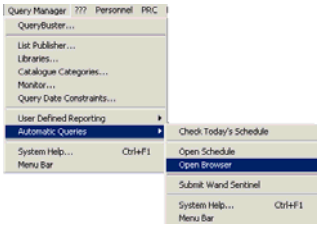
- Click 'Next' to run any query listed

A 'Running Query' box will appear for a few seconds

Other wise close this window and go to 'Retrieving Results of Automatic Queries' (next page)

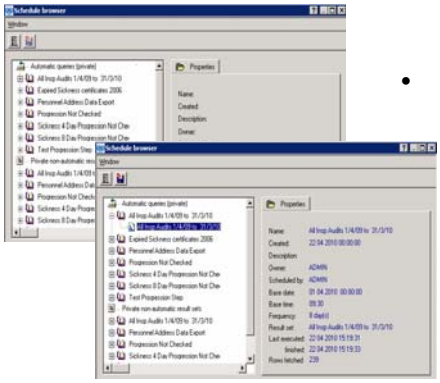
Retrieving Results of Automatic Queries

To see the results of the query that has just Ran



- Click onto 'Query Manager'
- Scroll down to 'Automatic Queries'
- Click onto 'Open Browser'

This window can also be accessed from within the published query view by clicking on the Binoculars icon.



- Select query by clicking on the '**+**' and any results of query run will be listed.

- Select results to be printed to screen and click on the floppy disk icon with a red arrow.

Results will now print to screen and can be printed to printer, saved or exported to excel.

Reference Date Functionality

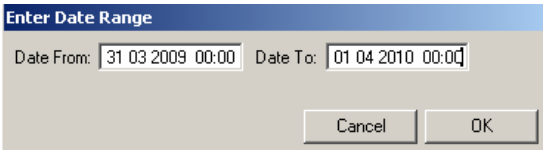
A number of queries use this functionality to allow a 'Date Range' to be entered – then only records between the set dates will be returned.

Within the query window

- Click onto the '1' icon

The 'Reference Date' window will appear:

- Enter the 'Date Range'



Queries that use the 'Reference Date' functionality generally have some note of it in the name of the

Query > ie 'Current Postings Ref Date'.

The 'Reference Date' is set on a per user basis and is stored in the central database – so it will be stored for a user regardless of which machine they use to log in from.